



## The New Ticket To Work

*New Program, New Opportunities*

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Dara Johnson, Arizona Employment and Disability Partnership

Aug-10

### Overview of Social Security Disability Programs

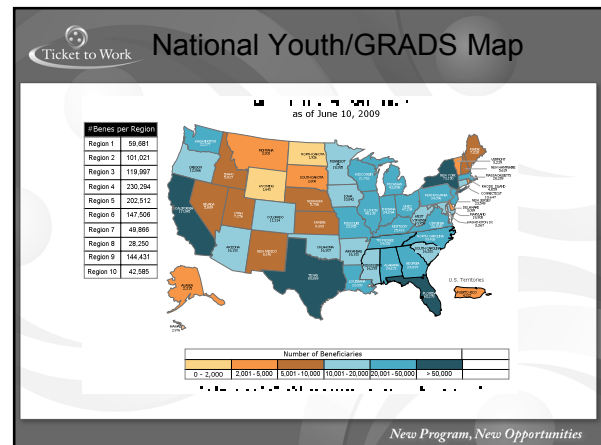
- SSA manages two disability programs:
  - Social Security Disability Insurance (SSDI) program
  - Supplemental Security Income (SSI) program
- SSDI - insured by workers' contributions
- SSI - limited income and resources
- Concurrent - eligible for both SSDI and SSI programs

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### What is the Ticket to Work Program?

- A **voluntary** employment program
- Offers beneficiaries (18-64) with disabilities receiving Social Security Disability Insurance (SSDI) and Supplemental Security Income (SSI) increased **choices** in obtaining services & supports to engage in work & achieve their employment goals
- Pays participating Employment Networks for Milestones and Outcomes beneficiaries achieve in moving towards self-supporting employment
- Ultimate goal: Reduce reliance on Social Security disability benefits, increase self-sufficiency, and improve the quality of life for beneficiaries**

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### Who Wants to Work?

- There are roughly 11.8 million people getting disability benefits from SSA
  - Approximately 6.4 million on SSDI
  - Approximately 3.9 million on SSI
  - Approximately 1.4 million dual eligibles
- SSA determined 92% of beneficiaries aged 18-39 with recent work history also have work goals
  - Nationally, this means about 470,000 beneficiaries who want to work

*[Based on the results of the TTW Evaluation and the National Beneficiary Survey]*

- With all adult beneficiaries ages 18 through 64 now eligible to participate, there are lots of beneficiaries to go around

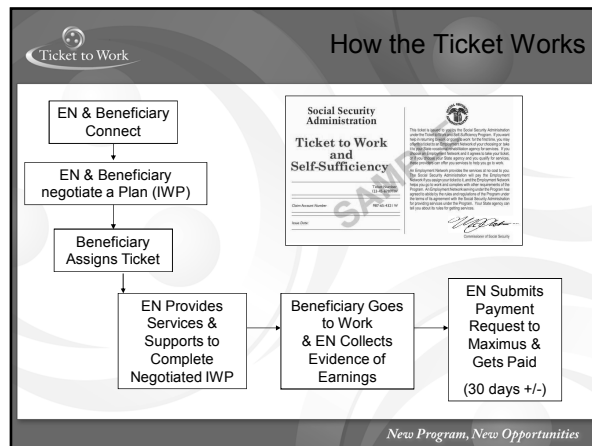
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### Why Work?

Work can enrich life by:

- Increasing independence
- Improving self-esteem, confidence, and fulfillment
- Helping you to acquire new skills through training and experience
- Creating new interpersonal, professional, and community ties

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### How Does the Program Work?

- If eligible, a paper Ticket is mailed to you
  - If you already receive disability benefits, your Ticket may have already been mailed to you
  - You do **not** need the paper Ticket to participate
- You decide:
  - Whether, where, and when to assign your Ticket
- Remember, participation is **free and voluntary**
  - There are no penalties if you choose not to participate.

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### Employment Networks

- Approved providers of services are called “Employment Networks” or “ENs.”
- Types of ENs include:
  - Schools, colleges and training programs
  - Public and private agencies
  - One-Stop Career Centers
  - Community-based service providers
  - Employers
  - State vocational rehabilitation (VR) agencies
- ENs and VR agencies receive payments when they help you get and keep a job.

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### Specific Services and Supports ENs Provide

**Not all ENs offer the same services. Talk to the EN about services you need before assigning your Ticket.**

- Counseling and guidance
- Education and training
- Job search, placement and retention services
- Job coaching and ongoing support services
- Work adjustment counseling
- Other supports and services

**You have the power to choose your EN!**

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### Individualized Work Plan

**You and the EN will agree upon an Individualized Work Plan (IWP)**


- Identifies your employment goal
- Lists services and supports the EN will provide
- Outlines how you will work together
- Signing the IWP = assigning your Ticket
- Your IWP can be changed!

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### Partnership Plus – A New Option Under the Ticket to Work Program


- If your State VR agency provided services, helped you get a job then closes your case, your Ticket still has value!
- Even though you are working, take your Ticket to an EN
- The EN can:
  - Provide additional job training
  - Provide ongoing supports
  - Help you keep your job
  - Help you advance in your job

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 **Work Incentives**

### What Are Work Incentives

- Work Incentives are SSA rules that help you keep your benefits as you explore work
- Ticket to Work is one of these Work Incentives




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 **Work Incentives Myth 1**

Myth 1: "If Social Security disability beneficiaries go to work, Social Security will conduct a review and they will lose benefits."

➤ **TRUTH:** Participation in the Ticket program and progressing towards one's employment goals will postpone regularly scheduled medical Continuing Disability Reviews

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 **Work Incentives Myth 2**


Myth 2: "If Social Security disability beneficiaries go to work, they will lose health care coverage."

➤ **TRUTH:**

SSDI Beneficiaries can get extended healthcare benefits after they return to work.

Many SSI beneficiaries are eligible to continue receiving Medicaid even after they stop receiving SSI benefits as a result of work.

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 **Continued Health Insurance**


**Medicare**

- You can **keep your Medicare** coverage for at least 93 mos after you complete the trial work period


**Medicaid**

- If you have earnings too high for a SSI cash payment, **you may still be eligible for Medicaid** through 1619(b).
- If your state has a Medicaid Buy-In program it may provide Medicaid benefits while you work.

AHCCCS  
Freedom to Work Program  
602-417-6677  
1-800-654-8713, Option 6




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 **Work Incentives Myth 3**

Myth 3: "If Social Security disability beneficiaries go to work, get off disability benefits and later lose their jobs, they will have to reapply and wait to get back on benefits."

➤ **TRUTH:** If a Social Security disability beneficiary goes to work and later stops working due to his/her disability, there is an "Expedited Reinstatement to Benefits"

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 **Expedited Reinstatement (EXR)**


**EXR may be possible if:**

- your cash disability benefits ended because of your work and earnings,
- and you stop work within 5 years of your benefits ending.

**Then:**


- SSA may be able to get you on benefits quickly.
  - Up to 6 months of "temporary cash benefits"
  - Continued Medicare and/or Medicaid coverage

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 **Additional Work Incentives**

- **Trial Work Period (TWP) (SSDI only)**
  - The TWP allows you to test your ability to work for at least 9 months
  - Full SSDI checks paid for each of those months
- **Extended Period of Eligibility (SSDI only)**
  - For 36 months after the TWP SSA may pay your full SSDI benefit in any months you earn below SGA without:
    - a new application,
    - disability determination,
    - or waiting period.


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 **SSI Employment Supports**

**Earned Income Exclusion**

- We do not count the first \$65 you receive in a month, plus one-half of the remaining earnings
- This means that we count less than one-half of your earnings when we figure your SSI payment amount


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 **SSI Employment Supports**

**Student Earned Income Exclusion**

- Under age 22 and regularly attending school
- We do not count up to \$1,640 of earned income per month when we figure your SSI payment
- The maximum yearly exclusion is \$6,600


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 **SSI Employment Supports**

**Plan to Achieve Self-Support (PASS)**

- Set aside other income besides your SSI
- Must have a work goal
- We do not count the income that you set aside under your PASS when we figure your SSI payment amount


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 **SSDI & SSI Employment Supports**

**Impairment-Related Work Expenses (IRWE)**

- We deduct the cost of certain IRWEs that you need to work from your gross earnings
- Need the item or service because of a physical or mental impairment
- Examples: Attendant care services, prosthesis, transportation, medicines


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 **SSDI & SSI Employment Supports**

**Section 301**

- If we find that you no longer have a disabling impairment, your benefit payments usually stop
- Benefits may continue if you are participating in a VR or similar program until your participation ends

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 **SSDI Employment Supports**


**Subsidy**

- Support provided by your employer
- May result in your receiving more pay than the actual value of the services you perform

**Special Conditions**


- Refers to support provided by someone other than your employer
- For example, a VR agency
- Job coach or extra assistance

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 **Return to Work Responsibilities**

- Tell us right away if
  - You return to work;
  - You already reported your work, but your duties, hours, or pay have changed;
  - You start paying for expenses that are needed for work due to your disability
- Report changes in work
  - By phone;
  - By fax;
  - By mail;
  - In person

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 **Who Can Help Me Understand All of This?**

- Work Incentives Planning and Assistance (**WIPA**) Projects
- Protection and Advocacy for Beneficiaries of Social Security (**PABSS**)
- SSA Area Work Incentives Coordinator (**AWIC**)

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 **Work Incentives Planning and Assistance Projects**

**WIPAs** are SSA-approved organizations that help beneficiaries make informed choices about work

- Services are Free!
- Community Work Incentives Coordinators (CWICs)
  - Provide information on work and work incentives
  - Answer questions about how work affects Federal, state and local benefits
  - Help find the resources or services to achieve your work goals
  - Host Work Incentives Seminar Events (**WISE**)

[www.ssa.gov/work/providers](http://www.ssa.gov/work/providers)  
 Arizona Work Incentives Planning and Assistance  
 1-866-304 WORK (9675)

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 **Work Incentive Seminars (WISE)**

**WISE Events:**

- Learn about the Ticket to Work program and other SSA Work Incentives
- Meet with:
  - ENs
  - The State VR agency
  - WIPA Project staff
  - SSA staff
  - Other beneficiaries who want to work
  - Additional state agencies and community partners

To find out if a WISE event is happening near you, visit [www.cessi.net/WISE/](http://www.cessi.net/WISE/)


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 **Protection and Advocacy for Beneficiaries of Social Security**

- Assist beneficiaries in obtaining information about VR and employment services
- Provide advocacy or other related services that beneficiaries may need to secure or regain gainful employment
- Visit [www.ssa.gov/work](http://www.ssa.gov/work) and click on "Service Provider Directory"

Arizona Center for Disability Law  
 602-274-6287  
 1-800-927-2260

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### What Are Area Work Incentives Coordinators?

**AWICs:**

- Are experts on SSA's Work Incentives and employment support programs
- Manage and coordinate Work Incentives Training
- Provide public support services to beneficiaries with disabilities who want to start or keep working
- Conduct public outreach

Visit <http://www.ssa.gov/work/awiccontacts.html> to find your local AWIC

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### What Is MAXIMUS?

MAXIMUS, the SSA contractor that assists in the administration of the Ticket to Work program:

- Helps you assign, un-assign and re-assign your Ticket
- Provides you with a replacement Ticket
- Helps you locate ENs

Contact MAXIMUS at 1-866-968-7842 (v), 1-866-833-2967 (tdd) or [www.yourtickettowork.com](http://www.yourtickettowork.com)


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### What Are Employment Networks?

- ENs can be: Public and Private Colleges and Universities, Community Colleges, High Schools, Private (for profit & non-profit) and government agencies, employers, etc. that offer education, job training and employment services
- A single entity, a partnership, or a coalition of providers functioning as a single EN
- Beneficiary and EN agree on services/supports to be provided and develop an Individual Work Plan (IWP)
- SSA pays the EN based upon the beneficiary attaining specific milestones and outcomes related to self-supporting employment


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### ENs Can Provide...

- Services and supports to assist beneficiaries in entering or re-entering the workforce and progressing towards self-supporting employment
  - Counseling and guidance
  - Education and training (vocational/technical/postsecondary)
  - Job search/job placement services
  - Job coaching
  - Work adjustment counseling
  - Job retention and ongoing support services
  - Other supports and services as spelled out in the IWP


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### Why Become an EN?

- Social Security Ticket Holders attend your School
- Your School is most likely already offering these services
- Receive new funding!
- The funding is unrestrictive and can be used for many purposes
- Receive timely and responsive support

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### Potential Revenue for an EN

These are flexible funds that can be used for many purposes

- Serve more people
- Hire additional Job Coach or Placement Specialist
- Create a flexible job support fund
- Hire a Work Incentives Planner
- Buy some new equipment


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 **Successful EN**

*"We signed up because we were interested in finding out who had a Ticket in our area so we could reach out to help them. It was so easy to sign up, easier than any grant. It's worth it for a college to become an EN because you can use the milestone payments any way you want."*


*~Jim Spencer  
Coordinator for Disability Support Services Career Services  
Southern Illinois University*

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 **Phase 1 Milestone Payments**  
2010 Rates


Type	Ticket Holder Gross Earnings	EN Payment (SSDI)	EN Payment (SSI)
<b>Phase 1</b>			
Milestone 1	\$360/mo for 1 calendar month	\$1,275	\$1,275
Milestone 2	\$720/mo for 3 months w/in 6 months (cumulative)	\$1,275	\$1,275
Milestone 3	\$720/mo for 6 months w/in 12 months (cumulative)	\$1,275	\$1,275
Milestone 4	\$720/mo for 9 months w/in 18 months (cumulative)	\$1,275	\$1,275
Total Potential Phase I Milestone Payments		\$5,100	\$5,100

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 **Phase 2 Milestone Payments**  
2010 Rates


Type	Ticket Holder Gross Earnings	EN Payment (SSDI)	EN Payment (SSI)
Phase 2	Gross > SGA (\$1,000/non-blind; \$1,640 for blind)	\$382/mo. (up to 11 mos.)	\$220/mo. (up to 18 mos.)
Total Phase 2 Payments		\$4,202	\$3,960
Total Potential Ticket Payments Phases 1 and 2		\$9,302	\$9,060

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 **Outcome Payments Under Outcome-Milestone Payment System**  
2010 Rates

Type	Ticket Holder Net Earnings	EN Payment (SSDI)	EN Payment (SSI)
Outcome Phase	Earnings > SGA (\$1,000/non-blind; \$1,640/blind) "AND" 0 cash benefit	\$382/mo. for 36 months	\$220/mo. for 60 months
Total Outcome Phase Payments		\$13,752	\$13,200
Total Potential Ticket Payments (Phases 1 & 2, and Outcomes)		\$23,054	\$22,260


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 **See for Yourself!**

Look at the people you served last year and use SSA's **EN Revenue Estimator** to determine potential revenue from the Ticket to Work Program.

[http://www.cessi.net/en\\_estimator/](http://www.cessi.net/en_estimator/)


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 **Requesting EN Payments**

**Simplified EN Payment Process**

- Three options for requesting payment
  - > Evidentiary Payment Request (EPR)
    - Requires primary evidence of earnings
  - > Certification Payment Request (CPR)
    - Uses secondary evidence of earnings
  - > Auto Pay (coming soon)
    - SSA gathers evidence of earnings (less work for EN, takes longer to get paid)


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 Documentation of Earnings

### Evidentiary Payment Request (EPR)

- Pay stubs, or
- Employer-prepared/signed earnings statements, or
- Records of monthly earnings through The Work Number

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 Documentation of Earnings

### Certification Payment Request (CPR)\*

- Recent, dated contact with beneficiary/employer; or
- Attach response to Earnings Information Request (EIR) showing earnings 3X SGA for the quarter; or
- Attached information from National Directory of New Hires (NDNH); or
- Self-Employment Income (SEI) Form

*\*CPR includes statement of agreement to repay*


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 Successful EN

*"I really like the aspect of residual income ... you can receive Outcome Payments for five years provided that Ticket-holders continue to work .... There's nothing quite like receiving direct deposits from the Social Security Administration for people that I returned to work over two years ago!"*


Paula Vieillet, President  
Employment Options, Inc.

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 New Opportunities for EN-VR Partnerships


- Some Colleges already partner with their State Vocational Rehabilitation Services
- VR Cost Reimbursement payments and EN Milestone and Outcome payments both possible for same beneficiary
- SSA will pay for sequential, but not concurrent, services
- When VR chooses to serve a beneficiary under Cost Reimbursement, beneficiary's Ticket is
  - Not assigned to VR, and
  - Cannot be assigned to another EN while VR case is open
- New "in-use SVR" status extends Continuing Disability Review (CDR) protection to beneficiary while receiving VR services under Cost Reimbursement

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 EN-VR Partnerships

- Beneficiary can assign Ticket to an EN after VR case closure
- Phase 1 Milestones not available to EN if VR closed case with beneficiary employed
  - VR provided services leading to initial efforts at self-supporting employment
  - SSA pays EN for Milestones & Outcomes achieved after Ticket assignment
- There is a CESSI VR Specialist that can work with your University/Community College and your state VR to discuss a partnership


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 Successful School Models

- Whittier Union High School District "Career Connection"
  - Benefits planning (i.e. Student Earned Income Exclusion)
  - IEP
  - Students are referred by teachers
  - Provide job development for students
  - Teach parents and students about the value of work, managing disability benefits and how to report wages
- California State University, Fresno
  - "Real World Hands on Learning" for Rehabilitation Counseling graduate students
  - External and internal partnerships to identify Ticket Holders

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 They're Saying

*"If you decide that you're going to take Ticket to Work seriously, then you need to approach it in a business-like manner. .... It takes time."*


Howard M. Schwartz, President and CEO  
Career Consulting Services of America

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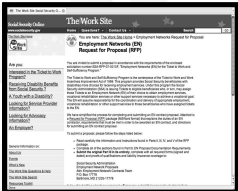
 Becoming an Employment Network

**Social Security provides services, supports, and resources to help at every step in the process.**


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 How Do I Become an EN?

Get the EN RFP at  
<http://www.ssa.gov/work/enrfp.html>




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 Receive Timely and Responsive Support

- **Streamlined EN application**, with personalized support available to help you complete it.
- SSA can **track your claim** through to payment and resolve payment problems.
- SSA has **decreased** the average payment processing time.
- **Training** is available on how to make the program work for you.


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 Need Help Completing the RFP?

Contact Leslie Barrett, University Specialist at CESSI (Program Manager for Recruitment and Outreach for TTW)

- Participate in an EN Application Walk-through conference call (E-Mail [leslieb@cessi.net](mailto:leslieb@cessi.net) or call 703-448-6155 x228)
  - > documentation requirements
  - > review forms
  - > Q & A
- Receive one-on-one assistance every step of the way

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 Additional Help Is Available

- **Assistance in responding to EN RFP also available by contacting SSA's Employment Contract Team (ENCT)**
  - > E-Mail [ENContracts@ssa.gov](mailto:ENContracts@ssa.gov)
  - > Call 1-866-584-5180
- **SSA EN Help Desk**
  - > New SSA service to assist ENs to follow up on outstanding EN payment requests
  - > Use if more than 30 days have passed since payment request was sent to SSA for payment consideration
  - > Email to [EN.HelpDesk@ssa.gov](mailto:EN.HelpDesk@ssa.gov) or fax to 410-597-1577

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**Help Continues!**

- **MAXIMUS (866) 949-ENVR (3687)**
  - Website – [www.yourtickettowork.com](http://www.yourtickettowork.com)
  - Ticket Training available
    - Ticket Training Tuesdays - FREE CD
    - Online, self-paced Training
  - Enhanced online directory listing
  - Beneficiary List
  - Online Newsletter – *Inside Ticket*

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**Presenter Contact Information**

Megan Didion Social Security Administration Area Work Incentive Coordinator Southwest Area 8 Ph: 866-348-7855 ext. 15505 Megan.Didion@ssa.gov	Dara Johnson Arizona Employment and Disability Partnership AHCCCS Project Director Ph: 602-417-4362 Dara.Johnson@azahcccs.gov
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**CHOOSE WORK RESOURCES**

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**Choose Work Web Site**  
[www.choosework.net](http://www.choosework.net)

**CHOOSE FULFILLMENT. CHOOSE EARNINGS. CHOOSE WORK.**  
Choose Work through the *Ticket to Work* program, offering people with disabilities\* a shot at achieving financial independence by enabling more choice in employment-related support services, and access to meaningful work.

**TICKET TO WORK OVERVIEW**

**TICKET STORIES**

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**Choose Work Web Site**

- First national broadcast hub for the Ticket Program, including:
  - Ticket Program basics
  - Informative video
  - Success stories
  - Online WISE
  - Local employment resources by region

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**Online Work Incentive Seminar Events**

Online WISE is now available for the first time for those who do not have access to an event in their area

**WISE EVENTS OVERVIEW**

**WISE CHAPTERS**


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**Resources Map**

Contact information for ENs, WIPA, Protection & Advocacy and Vocational Rehabilitation agencies made available via user-friendly map interface

**Resources Map**

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## For More Information

- Contact Leslie Barrett at CESSI [lbarrett@cessi.net](mailto:lbarrett@cessi.net) 703-448-6155 x 228 if you know of an organization who might be a perfect EN!
- For more information on the Ticket to Work Program:
  - > Visit SSA's Work Site at:  
[www.socialsecurity.gov/work](http://www.socialsecurity.gov/work)
  - > Visit CESSI's websites at:  
[www.cessi.net/ttw](http://www.cessi.net/ttw)  
[www.choosework.net](http://www.choosework.net)
  - > Visit the Maximus web site at:  
[www.yourtickettowork.com](http://www.yourtickettowork.com)  
or call: 1-866-949-ENVR (3687)

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# Questions?

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